



America's Finest City

THE CITY OF SAN DIEGO



# **Assessment Engineer's Report**

## **MISSION BOULEVARD MAINTENANCE ASSESSMENT DISTRICT**

**Annual Update for Fiscal Year 2007**

**under the provisions of the**

**San Diego Maintenance Assessment District Ordinance  
of the San Diego Municipal Code**

**and**

**Landscaping & Lighting Act of 1972  
of the California Streets & Highways Code**

**Prepared For**

**City of San Diego, California**

**Prepared By**

**Boyle Engineering Corporation**

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**June 2006**

# **CITY OF SAN DIEGO**

## **Mayor**

Jerry Sanders

## **City Council Members**

Scott Peters  
District 1 (Council President)

Kevin Faulconer  
District 2

Toni Atkins  
District 3

Anthony Young  
District 4 (Council President Pro Tem)

Brian Maienschein  
District 5

Donna Frye  
District 6

Jim Madaffer  
District 7

Ben Hueso  
District 8

## **City Attorney**

Michael Aguirre

## **Chief Operating Officer**

Ronne Froman

## **City Clerk**

Elizabeth Maland

## **Independent Budget Analyst**

Andrea Tevlin

## **City Engineer**

Hosseini Ruhi

## **Assessment Engineer**

Boyle Engineering Corporation

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## EXHIBITS

Exhibit A: Boundary Map

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# Assessment Engineer's Report

## Mission Boulevard

## Maintenance Assessment District

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### Preamble

Pursuant to the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscaping and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"), in connection with the proceedings for the MISSION BOULEVARD MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as "District"), BOYLE ENGINEERING CORPORATION, as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. \_\_\_\_\_ ,  
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN  
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2006.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

## Executive Summary

**Project:** Mission Boulevard  
Maintenance Assessment District

**Apportionment Method:** Equivalent Benefit Unit (EBU)

	<b>FY 2006</b>	<b>FY 2007 <sup>(1)</sup></b>	<b>Maximum <sup>(2)</sup> Authorized</b>
<b>Total Parcels Assessed:</b>	2,227	2,235	--
<b>Total Estimated Assessment:</b>	\$45,189	\$0.00	--
<b>Total Number of EBUs:</b>	3,077.64	3,076.64	--
<b>Assessment per EBU:</b>	\$14.68	\$0.00	\$16.36 <sup>(3)</sup>

<sup>(1)</sup> FY 2007 is the City's Fiscal Year 2007, which begins July 1, 2006 and ends June 30, 2007. Total Parcels Assessed, Total Estimated Assessment, and Total Number of EBUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

<sup>(2)</sup> Maximum Authorized annual amounts subject to cost indexing provisions as set forth in this Assessment Engineer's Report.

<sup>(3)</sup> Fiscal Year 2006 maximum authorized annual assessment increased by cost indexing factor of 4.01%.

**Proposition 218 Compliance:** The District, originally formed in June 1981, was re-engineered in Fiscal Year 1998 for compliance with Proposition 218. By a ballot proceeding, majority property owners (62.91% of the weighted vote) approved Fiscal Year 1998 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost indexing.

**Annual Cost Indexing:** An increase of assessments, under authority of annual cost indexing provisions, is required for Fiscal Year 2007.

**Bonds:** No bonds will be issued in connection with this District.

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## Background

The Mission Boulevard Maintenance Assessment District (District) was originally established in June 1981 under the provisions of the San Diego Maintenance Assessment District Ordinance. The general purpose of the District was and still is to provide for the maintenance of landscaped rights-of-way (trees) and planters located on Mission Boulevard. The original Assessment Engineer's Report is on file in the City of San Diego (City) Clerk's office.

The District was re-engineered in Fiscal Year 1998 for compliance with Proposition 218. By a mail ballot proceeding, property owners approved the re-engineering with 62.91% of weighted votes supporting the proposed assessments. Over 41.1% of property owners responded to the mail ballot.

The Assessment Engineer's Report, preliminarily accepted by Resolution Number R-288806 on June 8, 1997, proposed Fiscal Year 1998 assessments, maximum authorized assessments for subsequent years, and provisions for annual cost indexing of the maximum authorized assessments. The Assessment Engineer's Report was approved and assessments confirmed by Resolution Number R-289042 on August 5, 1997.

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## District Proceedings for Fiscal Year 2007

This District is authorized and administered under the provisions of the "San Diego Maintenance Assessment District Ordinance" (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the "Landscaping and Lighting Act of 1972" (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of "Proposition 218" (being Article XIID of the California Constitution), and provisions of the "Proposition 218 Omnibus Implementation Act" (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as "Assessment Law"). This report has been prepared in compliance with Assessment Law.

The purpose of the proposed proceedings and this Assessment Engineer's Report is to update the District budget and assessments for Fiscal Year 2007. The Fiscal Year 2007 assessments proposed within

this Assessment Engineer's Report do not represent an increase from the previous year's assessment. Therefore, the vote requirements of Section 4 of Article XIID do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

### **Bond Declaration**

No bonds will be issued in connection with this District.

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### **District Boundary**

The Boundary Map & Assessment Diagram for the District are on file in the Maintenance Assessment Districts section of the Park and Recreation Department of the City of San Diego and by reference are made a part of this report. The Boundary Map and Assessment Diagram for the District are available for public inspection during normal business hours. A reduced copy of the Boundary Map is included as Exhibit A hereto.

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### **Project Description**

The project is the maintenance of trees and planter boxes along Mission Boulevard between San Diego Place and the Mission Beach jetty and within the 800 block of West Mission Bay Drive. The engineering drawings for these improvements are on file at Map Records in the City Engineer's office and are incorporated herein. The drawing numbers are as follows:

D-19804

D-23470

D-23511

Maintenance includes irrigation of trees by water truck, litter control thrice weekly, and weekly graffiti inspection and removal.

The specifications for the maintenance to be performed are contained in City Contract No. C5130/97, which is incorporated herein by reference and is on file with the City Clerk and the Park and Recreation Department. The specifications for the maintenance are available for public inspection during normal business hours.

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## Separation of General and Special Benefits

The City makes no contribution to the District. All maintenance, operation, and administrative costs that are funded by the District are considered “special benefits.” The City does not provide similar services to the public at large as a “general benefit.”

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## Cost Estimate

### Estimated Costs

Estimated Fiscal Year 2007 annual expenses, revenues, reserves, and assessments (provided by the City) are included as Exhibit B hereto.

### Annual Cost Indexing

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. For small assessment districts or districts with relatively low dollar assessments, the cost of an engineer's report, balloting, and the public hearing process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U), as approved by the District property owners in Fiscal Year 1998, allows for minor increases for normal maintenance and operating cost escalation without incurring the costs of the Proposition 218 ballot proceedings. Any significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.

The maximum authorized assessment established in the Fiscal Year 1998 proceedings are authorized to be indexed (increased or decreased) annually by the factor published in the SDCPI-U. Fiscal Year 1999 was the first year authorized for such indexing. It has been determined that an increase of assessments, as authorized by the cost

indexing provisions, is not required for Fiscal Year 2007.

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## **Method of Apportionment**

### **Estimated Benefit of the Improvements**

The improvements provided by this District are associated with the maintenance of street rights-of-way, street medians, and open space.

#### ***Street Rights-of-Way and Medians***

Mission Boulevard and West Mission Bay Drive are the only arterial streets within the District. They are the backbone of the street network within the community. They serve as the primary access routes in and out of the community, cross-community trips and thus serve all parcels within the community. All parcels benefit from the enhancement of these streets and the enhanced community image provided by the improvements being maintained by this District.

The Transportation Element of the City's General Plan and the General Policy Recommendation found in the Mission Beach Precise Plan and Local Coastal Program Addendum Community Plan establish several goals for the community's streets. The improvements being maintained by this District are consistent with the Plans' goals for safety and pleasing aesthetics. The maintenance for these enhanced assets, since installation, has been funded through the District. The General Plan also supports the establishment of community landscape improvement and maintenance districts, such as this District, to accomplish these goals.

### **Apportionment Methodology**

The total cost for maintenance of the improvements will be assessed to the various parcels in the District in proportion to the estimated Equivalent Benefit Units (EBUs) assigned to a parcel in relationship to the total EBUs of all the parcels in the District.

EBUs are a function of two factors, a Land Use Factor, and Benefit Factor, related as shown in the following equation:

$$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor}$$

Each of these factors are discussed and developed below.

### Land Use Factor

Since the improvements to be maintained or provided by the District are primarily associated with the Transportation Element of the General and Community Plans, trip generation rates for various land use categories (as previously established by the City's Transportation Planning Section) have been used as the primary basis for the development of Land Use Factors. While these trip generation rates strictly address only vehicular trips, they are also considered to approximately reflect trip generation for other modes of transportation (e.g., pedestrian trips, bicycle trips, etc.), and are considered the best available information for these other transportation modes.

The special benefits of landscape improvements maintained or improved by the District are linked to trip generation primarily by the public safety and aesthetic enhancement enjoyed by travelers through the community. Thus trip generation rates provide the required nexus and basis for assigning ratios of maximum potential benefit to the various land use/zoning classifications as defined by the City's Municipal Code.

Land use/zoning classifications have been grouped with averaged trip generation rates assigned to establish the Land Use Factors as shown in Table 1.

**TABLE 1: Land Use Factors**

<b>Land Use/Zoning</b>	<b>Code</b>	<b>Land Use Factor</b>
Residential – Single Family (detached)	SFD	1.0 per dwelling unit
Residential – Condominium	CND	0.7 per dwelling unit
Residential – Multi-Family & Apartment	MFR	0.7 per dwelling unit
Residential – Duplex	DUP	0.7 per dwelling unit
Commercial – Office & Retail	COM	45.0 per acre
Educational – Primary & Secondary	EPS	5.0 per acre
Belmont Park	BEL	25.0 per acre
Hotel	HTL	15.0 per acre
Park – Developed	PKD	5.0 per acre
Street/Roadway	STR	0.0 per acre

While those traveling streets and roadways enjoy the improvements maintained or provided by the District during their travel, the actual benefit of this enjoyment accrues to the lands at the origins and destinations of their trips, not to the lands of the streets and roadways, themselves. Accordingly, streets and roadways receive no benefit and have been assigned a Land Use Factor of zero.

### ***Substandard Size Parcels***

A number of very small parcels, on the order of several square feet to several hundred square feet exist within this district. The reason for these substandard parcel sizes is unknown, however they are likely remainder parcels from earlier lot divisions or gaps in survey records. Regardless of the reason, a number of Assessor Parcels exist that are significantly below the size requirements that would indicate a buildable lot. Where this has occurred within residential zones, an undeveloped dwelling unit count of zero has been assigned.

### ***Undeveloped Parcels***

Undeveloped residential lots have been assessed based on their future development potential in accordance with the following formula:

$\text{Number of Dwelling Units} = \text{Actual Lot Size} / \text{Minimum Lot Size}$
--

The number of units is rounded to the lowest whole number. The undeveloped residential lots within the District are limited to a potential dwelling unit count of either one or two units. Undeveloped commercial lots have been assessed at the same rate as developed commercial lots.

### ***Belmont Park***

Assessor Parcel Number 423-680-01 includes both public park use and commercial use. The park use accounts for 45% of the area and the commercial use (roller coaster and promenade) account for 55% of the area. The benefit factor and use factor for this parcel has been weighted to reflect the area dedicated to each use.

### **Benefit Factor**

The Land Use Factor described above reflects the relative intensity of use (or potential use) of the various parcels of land to be assessed. It does not address the relationship of this use to the specific improvements to be provided or maintained by the District. This relationship is reflected in the Benefit Factor utilized in the assessment methodology.

In determining the Benefit Factor for each land use category, the subcomponents of the benefits of District improvements considered may include some or all of the following: public safety, view corridors and aesthetics, enhancement of community identity, drainage corridors, and recreational potential. As Benefit Factors and their subcomponents are intended to reflect the particular relationships between specific land uses within a district and the specific improvements maintained or provided by the district, Benefit Factors will generally vary from one district to another, based on the specific details of the applicable land uses and improvements provided.

The applicable benefit subcomponents and resultant composite Benefit Factors determined for the various land use/zoning categories within this District are as shown in Table 2.

**TABLE 2: Benefit Factors by Land Use**

<b>Land Use/Zoning</b>	<b>Public Safety (max. 0.2)</b>	<b>Aesthetics (max. 0.8)</b>	<b>Composite Benefit Factor (max. 1.0)</b>
Residential – All	0.2	0.8	1.0
Commercial – Office & Retail	0.2	0.4	0.6
Educational – Primary & Secondary	0.2	0.4	0.6
Belmont Park	0.2	0.2	0.4
Hotel	0.2	0.4	0.6
Park – Developed	0.2	0.0	0.2
Street/Roadway	0.2	0.0	0.2

### ***Public Safety***

All land uses are considered to receive the maximum available benefit from the public safety element of District improvements. Public safety is essential to all land uses, and even to lands, such as designated Open Space, held in stewardship with only incidental human use.

### ***Aesthetics***

The degree of benefit received from the aesthetic qualities of open spaces and landscaped roadway medians and rights-of-way maintained or provided by the District varies among land use categories. Generally, by nature of their use, residential lands receive the greatest benefit from the reduced traffic congestion, reduced noise levels, greater separation from traffic and generally more tranquil environment provided by open spaces and landscaped roadway medians and rights-of-way. Commercial and institutional uses, on the other hand, often thrive on higher densities, greater traffic access, and a higher level of activity in the vicinity of their enterprises. These uses, accordingly, receive a lesser degree of benefit from the general insulation and separation provided by the aesthetic elements of District improvements.

Lands in the Street/Roadway, and park categories are considered to receive no significant benefit from the aesthetic elements of

District improvements, as enhanced aesthetic quality of other lands in their vicinity does not affect their function, use, or value.

### **Equivalent Benefit Units (EBUs)**

As described above, the number of Equivalent Benefit Units (EBUs) assigned to each parcel in the District has been calculated, based on the preceding factors, as follows:

$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor}$
--

Based on the above formula, the EBUs calculated for each property, can be found in the Assessment Roll (Exhibit C).

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## Summary Results

The District Boundary is presented in Exhibit A.

An estimate of the costs of the improvements provided by the District is included as Exhibit B to this report.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the EBUs and Fiscal Year 2007 District assessment for each parcel were calculated and are shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2007 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

BOYLE ENGINEERING CORPORATION

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Eugene F. Shank, PE

C 52792

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Carolyn R. Crull

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2006.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the \_\_\_\_\_ day of \_\_\_\_\_, 2006.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

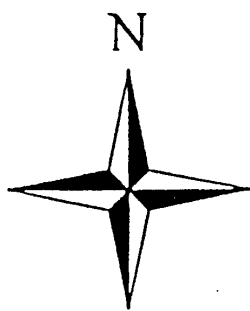
I, \_\_\_\_\_, as SUPERINTENDENT OF STREETS of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram was recorded in my office on the \_\_\_\_\_ day of \_\_\_\_\_, 2006.

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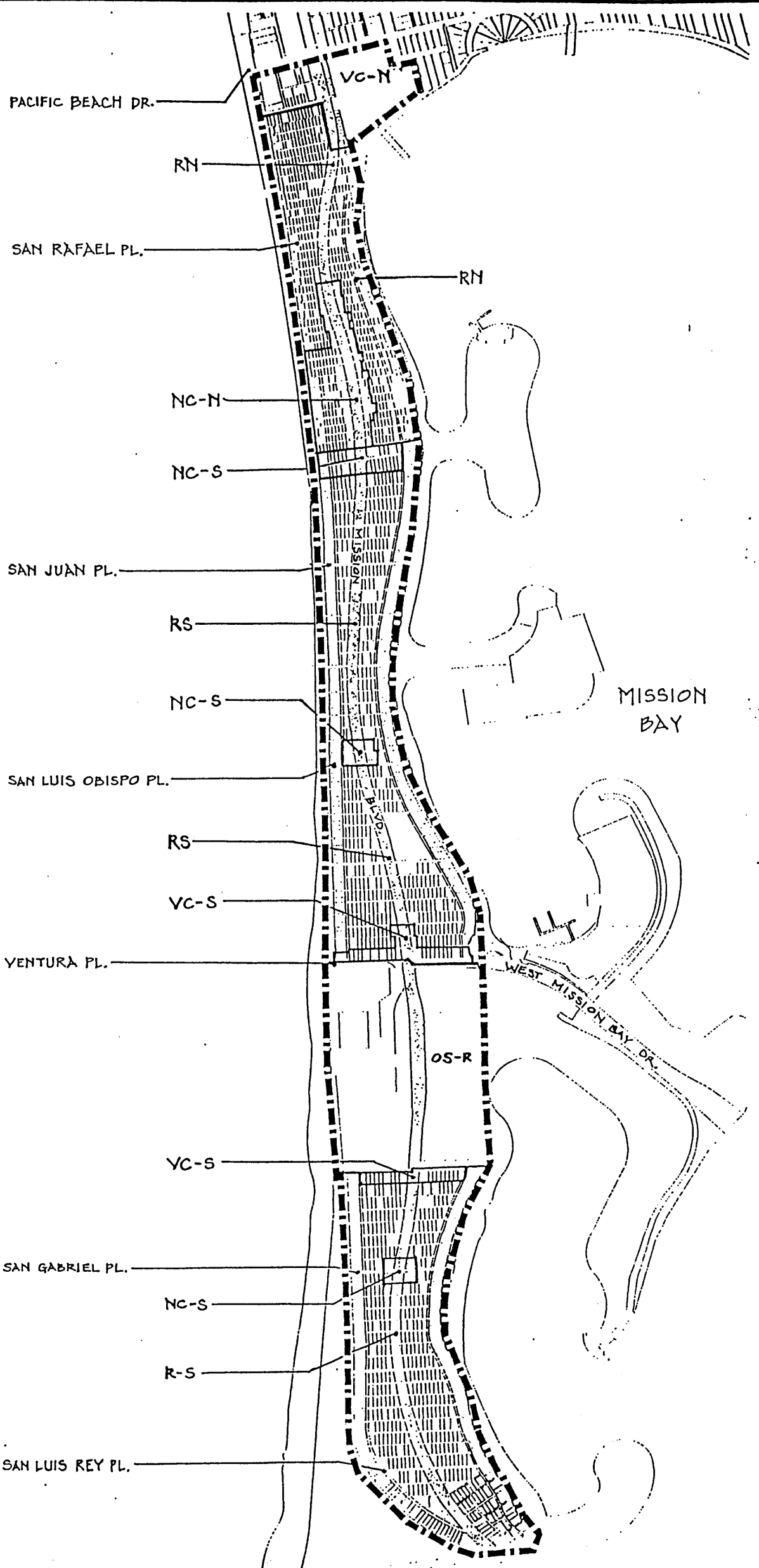
Hosseini Ruhi, SUPERINTENDENT OF STREETS  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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# **EXHIBIT A**



SCALE: 1 inch = 800 feet



#### LEGEND

 LANDSCAPE  
MAINTENANCE AND  
STREET SWEEPING

#### ZONING LEGEND

NC-N NEIGHBORHOOD  
COMMERCIAL NORTH  
NC-S NEIGHBORHOOD  
COMMERCIAL SOUTH  
OS-R OPEN SPACE  
RECREATIONAL  
RN RESIDENTIAL NORTH  
RS RESIDENTIAL SOUTH  
VC-N VISITOR COMMERCIAL  
NORTH  
VC-S VISITOR COMMERCIAL  
SOUTH

SAN GABRIEL PL.  
NC-S  
R-S  
SAN LUIS REY PL.

## MISSION BOULEVARD Maintenance Assessment District

EXHIBIT A

# **EXHIBIT B**

# EXHIBIT B - Estimated Annual Expenses, Revenues & Reserves

Mission Boulevard - Fund No. 70219

	FY 2005 BUDGET	FY 2006 BUDGET	FY 2007 REVISED
<b>BALANCE FROM PRIOR YEAR</b>	\$ 129,646.00	\$ 136,628.00	\$ 150,295.00
<b>REVENUE</b>			
Assessments	\$ 45,225.00	\$ 45,225.00	\$ -
Interest	\$ 4,773.00	\$ 4,964.00	\$ 2,100.00
Environmental Growth Fund	\$ -	\$ -	\$ -
Gas Tax Fund	\$ -	\$ -	\$ -
General Fund	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -
<b>TOTAL REVENUE</b>	<b>\$ 49,998.00</b>	<b>\$ 50,189.00</b>	<b>\$ 2,100.00</b>
<b>TOTAL REVENUE AND BALANCE</b>	<b>\$ 179,644.00</b>	<b>\$ 186,817.00</b>	<b>\$ 152,395.00</b>
<b>EXPENSE</b>			
<b>OPERATING EXPENSE</b>			
Personnel	\$ 3,995.00	\$ 4,332.00	\$ 4,375.00
Contractual	\$ 41,000.00	\$ 37,003.00	\$ 48,736.00
Incidental	\$ 9,564.00	\$ 5,918.00	\$ 5,646.00
Utilities	\$ -	\$ -	\$ -
<b>TOTAL OPERATING EXPENSE</b>	<b>\$ 54,559.00</b>	<b>\$ 47,253.00</b>	<b>\$ 58,757.00</b>
<b>RESERVE</b>			
Contingency Reserve	\$ 125,085.00	\$ 139,564.00	\$ 93,638.00
<b>TOTAL RESERVE</b>	<b>\$ 125,085.00</b>	<b>\$ 139,564.00</b>	<b>\$ 93,638.00</b>
<b>BALANCE</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>TOTAL EXPENSE AND RESERVE</b>	<b>\$ 179,644.00</b>	<b>\$ 186,817.00</b>	<b>\$ 152,395.00</b>

# **EXHIBIT C**

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.